



**STATE OF MONTANA  
MONTANA DEPARTMENT OF TRANSPORTATION  
JOB PROFILE**

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Update

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Formal Review

**Date Submitted** \_01/20/12

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***SECTION I - Identification***

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**Working Title:** Transportation Planner

**Department:** Transportation

**Job Code Number:** 193536

**Division & Bureau:** Rail, Transit,  
Planning / Highway Traffic Safety Office

**Job Code Title:** Transportation Planner

**Section & Unit:**

**Pay Band:** 6

**Work Address:** 2701 Prospect Ave  
Helena, MT 59602

**Position Number:** 36109

**Phone:** 406-444-6100

☐

FLSA Exempt

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FLSA Non-Exempt

☐

Non-Union

☒

MPEA

☐

Blue Collar

**Profile Completed By:** Chris Currie/Lynn Zanto

**Work Phone:** 444-6100

***Work Unit Mission Statement or Functional Description:***

The MDT's mission is to serve the public by providing a transportation system and services that emphasize quality, safety, cost effectiveness, economic vitality and sensitivity to the environment. The principal goals of the Rail, Transit and Planning Division are to develop and implement a long-range multimodal construction program that addresses Montana's most important statewide transportation needs and to support the development and safety of Montana's multimodal transportation system. These dual goals are addressed through the complex interaction and interrelationship of the Data and Statistics, Planning & Policy Analysis, Highway Traffic Safety, Environmental, and Multimodal Programs Bureaus, as well as the Project Analysis Unit.

The Highway Traffic Safety Office promotes public safety, health, and welfare through efforts to reduce traffic crashes, deaths, and injuries. It conducts several programs with multiple projects, to identify traffic safety problems and establish countermeasures that limit associated personal, social, and economic losses. The Highway Traffic Safety Office is responsible for planning, managing, funding, and coordinating highway and local safety programs. Major issues in traffic safety include speeding, the lack of use or misuse of safety restraints, the use of alcohol or other drugs and then driving, and the increasing exposure to risks by our yearly increased use of the roadway system (pedestrians, drivers, passengers, motorcyclists, and bicyclists are at increased risk on Montana's public roadways from this

increased use of the roadways). Functions include developing policies and guidance on safety issues; conducting statistical analyses of traffic data; identifying crash clusters; developing an annual safety program based on cost/benefit analysis of crash clusters; improving safety by addressing occupant protection and driver behavior; and providing safety and traffic information.

***Describe the Job's Overall Purpose:***

This position is the Highway Traffic Safety Office Grants Accountant. This position is responsible for maintaining accounting and financial transaction procedures, coordinating annual grant applications; systems, and business processes; conducting fiscal analyses; prepare budgets related to financial and federal grant activities; coordinating and monitoring the use of all state and federal highway traffic safety monies; and providing technical assistance and guidance to program managers and sub-grantees. The position also provides and coordinates a range of professional fiscal and program functions in support of Traffic Safety programs. The position is responsible for the, accounting, and distribution of over \$7 million annually. The position reports to position 54133216 and does not directly supervise others.

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***SECTION II - Major Duties or Responsibilities***

*This section should be a clear concise statement of the position's major duties and the approximate percent of work time for each duty*

***% of Time***

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**A. Program Development and Coordination 40 %**

1. Analyzes state and federal issues to develop applications for federal NHTSA grant funds. This involves coordinating with local, state, tribal and federal agencies to determine eligibility, scope, and timing of various projects; coordinating planning efforts of HTSO; and ensuring that plans meet the needs of the state and are implemented.
2. Assists in reviewing grant applications and proposals prepared by sub-grantees to seek program funding through NHTSA. This involves researching state and local needs and issues, and state and federal rules to develop clear and persuasive proposals for projects; illustrating the benefits of the proposed project to the sponsor; developing specific cost projections; and negotiating conditions of funding.
3. Analyzes funding and researches historical data, pending legislation, transportation planning & research studies, and other sources to identify program fiscal needs in conjunction with constituents and partner agencies throughout the state, determine spending authority requirements, make local programs aware of fiscal status, and assist in prioritizing projects based on need.
4. Assists in providing information, project planning, and technical support to sub-grantees, local and tribal governments and agencies, MDT management, and NHTSA to facilitate effective program planning, optimize funding, and communicate on work progress and problems encountered by agencies. Presents, explains, and justifies program status reports and recommendations to identify deficiencies and opportunities, resolve problems, and ensure effective communication between funding authorities, intermediaries, and program managers.
5. Critically reviews MDT Highway Traffic Safety activities to insure consistency with federal and state requirements and resolved inconsistencies. Researches and examines federal regulations, NHTSA policy guidance and circulars, restrictions, USC's, CFR's, state laws, spending

authorities, and other written documents and prepared program information and outreach materials for program managers and sub-grantees.

6. Develops and monitors program budgets by reviewing allocations, recommendations from sub-grantees, project plans and objectives, contracts, funding agreements, and expenditures. Develops allocations to ensure adequate support is provided, and to ensure program compliance with federal, state, and MDT laws, regulations, and policies (e.g., NHTSA, FHWA policy guidance, CFRs, legislative spending authority, etc.) by reviewing current policies and practices in relation to state and federal mandates and applicable legislation and mission mandates.
7. Coordinates and participates in the NHTSA state management reviews. Includes preparing and compiling requested information for submission to the Federal Regional Office prior to the management review. Provides required information to the federal review team during the review and assists in any written response required based on the federal report issued by the Federal Regional Office.
8. Monitors and coordinates oversight of grant program activities through participation in state management reviews and personal review of reports and performance measurements; reviewing and documenting budget or goal changes; recommending program guidelines and alterations; and implementing corrective actions as necessary.

**B. Fiscal and Contract Oversight**

**55%**

1. Preparation of contracts to ensure completeness and accuracy with regard to contract and administrative requirements. Conducts research to identify contract specifications and provisions and develops timeframes, performance requirements, and other contract administrative requirements. Maintains the contract monitoring schedule and provides pertinent information and reminders to program managers.
2. Monitors and maintains controls to ensure the timeliness, accuracy, and regulatory compliance of financial activities by researching and analyzing problems and designing and/or identifying solutions. This involves identifying data and reporting needs; evaluating financial activities to identify accounting data that must be reported and extracted; examining state and federal regulatory reporting requirements; and evaluating GAAP and GASB requirements and pronouncements.
3. Analyzes the impacts of changes in accounting procedures, policies, and regulations and recommends courses of action or change and implementation strategies to management. This includes changes in Highway Traffic Safety project development, monitoring, reporting, and other issues. Implements and provides guidance to internal and external personnel on these approved strategies. Devise and recommend new procedures and methods to the supervisor, and delineate and implement any resulting changes and stipulations.
4. Allocates and monitors the HTSO spending plan for NHTSA, FHWA and state funds to properly establish and reflect project funding according to state and federal regulations. This involves interpretation of state and federal laws and regulations requiring variable accounting and

reporting procedures. Performs reconciliations of MDT systems, SABHRS and the Federal Grant Tracking System (GTS) to reflect project accounting required by NHTSA and FHWA.

5. Review accounting and other related systems to ensure that transactions are correct and accurate. Assist in evaluating financial transactions to ensure financial activities are processed in an accurate and timely manner. This involves reviewing accounting transactions to ensure appropriate system recording, the accuracy of financial information, and compliance with MDT and state policies and procedures and federal laws and regulations.
6. Perform necessary reconciliation, adjustments, and corrections of SABHRS and internal accounting systems to ensure the integrity and accuracy of accounting data and transactions. This includes balancing accounts by examining documents to identify errors; making adjustments and breaking out accounting data for reports submitted to NHTSA; identifying and initiating correcting journals for discrepancies between MDT accounts payable and SABHRS; coordinating accounting activities and resolving problems in coordination with program managers, supervisor and Administration Division; and establishing procedures to ensure errors are not repeated.
7. Prepares monthly, quarterly, and annual financial reports for all federal programs administered by the Highway Traffic Safety Office to provide necessary information and to ensure compliance with reporting requirements. Prepares various financial schedules and reports by compiling, manipulating, and collecting fiscal data. Reviews and interprets state and federal accounting and reporting guidelines and develops reporting functions.
8. Ensure the department CARES Detail Ledger adequately records accounting, and related financial information to meet state and federal reporting requirements. Identify reporting requirements and determine system changes or enhancements needed to meet HTSO business needs and reporting requirements.
9. Establishes and maintains procedures to track funding and disbursements according to the categories described in the budget. Develops and provides reporting forms for program managers, reviews the monthly billing to NHTSA for reimbursement prior to submittal by Administration Division, and ensures reimbursements are properly recorded on SABHRS.
10. Evaluates documentation of claims for reimbursement to ensure eligibility and proper approval by program managers and to properly categorize and support costs paid. These include contracts as well as cost incurred in the general operations of HTSO. The claims submitted by the sub-grantees are compared with the terms of the contract and other claims are substantiated by required invoices and receipt of goods or services. Ensures project expenditures are approved by program managers, and reports any irregularities or ineligibility to program managers.
11. Coordinate project audits with program managers, and sub-grantees, to ensure state and federal audit requirements are met. This includes providing information, recommendations, and documentation resulting from desk reviews, compiling and providing required information and supporting documentation, coordinating information exchange between sub-grantees and program managers and reporting audit findings and recommendations to supervisor for review.
12. Monitors financial activities on contracts and projects to ensure compliance and provide information and recommendations to program managers. This includes establishing and reviewing required reports, working with program managers to gather additional information and clarification and to provide instruction and technical assistance, and conducting on-site reviews to determine compliance and to document findings. Conducts desk reviews according to the

procedures developed by HTSO using the NHTSA guidelines, federal circulars, and any other regulations applicable to the contract.

13. Formulate and execute close-out reports for the federal fiscal year summarizing all contracts according to NHTSA Standard areas. Describe tasks, classifies expenditures, and completes electronic close outs (close-out procedures vary with the type of funding source). Carry remaining funds forward into the next federal fiscal year according to the NHTSA approved plan.

**D. OTHER DUTIES AS ASSIGNED**

**5%**

Performs a variety of other duties in support of ongoing Highway Traffic Safety Office and Department operations. This includes coordinating special projects, attending meetings and conferences, and participating in ongoing training and educational programs as directed.

1. The following duties and/or specific tasks listed under section II above are considered "essential functions" because they require specialized expertise and skill and are the primary reasons the job exists (they must be performed by this position with or without accommodations):

***The following mental and physical demands are associated with these essential functions:***

**PHYSICAL**

Carrying light items (papers, books, small parts)

Ability to travel including occasional overnight stays for training, meetings, conferences, and project reviews

Remaining seated for extended periods of time, with occasional walking, standing, bending

Consistent use of keyboard

Communicating in writing, in-person, and over the phone

**MENTAL**

Ability to multi-task

Demands for accuracy in all aspects of work

Ability to meet inflexible deadlines

Copying or transcribing data

Computing arithmetic operations

Synthesizing information from a variety of sources

Analyzing data

Negotiating

Comparing data

Compiling information

Coordinating multiple activities

2. Does this position supervise others? ☐ Yes ☒ No

3. Attach an Organizational Chart.

[http://mdtinfo.mdt.mt.gov/other/mdt/internal/rail\\_transit\\_planning/planning\\_org\\_charts.pdf](http://mdtinfo.mdt.mt.gov/other/mdt/internal/rail_transit_planning/planning_org_charts.pdf)

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**SECTION III - Minimum Qualifications - List minimum requirements for the first day of work.**

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**Critical knowledge and skills required for this position:**

**KNOWLEDGE:** The position requires an advanced knowledge of the principles and practices of governmental accounting and budgeting; planning, research and analysis practices; business administration; Federal grant management procedures, Generally Accepted Accounting Principles; Governmental Accounting, Auditing, and Financial Reporting requirements; and state and federal rules and regulations related to agency program and accounting activity.

The position also requires knowledge of automated accounting software, management and financial systems and other systems. The position requires knowledge of complex funding structures, administrative goals and objectives, legislative and administrative rule requirements and processes. The position will become familiar with State and Federal statutes, rules, regulations, policies, and procedures; state and federal budget and financial reporting requirements; and adult education and training methods.

**SKILLS:** This position requires advanced skills in project planning and oversight; written and verbal communication, facilitation, various analytical techniques, research methods, The position requires skill in the use of PCs and typical business software applications, Federal grants management software, data collection and analysis, operation of office equipment, and in conducting compliance and process reviews.

**Behaviors required to perform these duties:**

See MDT Core Behaviors

Technical Accounting:

Understands and applies generally accepted accounting procedures; accurately interprets federal circulars; properly applies review procedures and ensures adequate documentation and audit trails; effectively works under deadlines and expense ceilings; identifies and initiates correcting journals for accounting errors; ensures the accuracy of work products; effectively integrates information from multiple systems; interprets and applies state and federal rules, regulations, and guidelines; understands and applies the techniques of contemporary financial analysis and reporting; monitors innovative trends, techniques and performance measures, and integrates them into practice.

Customer Service:

Understands, anticipates, and responds in a timely manner to customer needs; provides guidance and interpretation of information to assist customers in action planning from data.

Analysis:

Analytical thinker; thorough and comprehensive; uses logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems, continually evaluates alternative methods toward process improvement and challenges activities to ensure they add value. Is a valued information source and helps facilitate change and results through joint problem solving.

Communication:

Provides timely and concise information to others both verbally and in writing, and helps others communicate effectively; manages disagreements by bringing them into the open and attempting to resolve them collaboratively, achieves results through team building, encouraging participation, drawing on the talents of all team members, and ensuring that team has what it needs to succeed; interacts openly and honestly, encouraging others to express views and listens and respects different viewpoints and addresses misunderstandings directly with others involved.

Commitment & Initiative:

Keeps the best interest of the department in mind; exhibits initiative, energy, and foresight; takes pride in the job; actively engages in professional self-improvement activities; accepts responsibility for all actions taken; understands the implications of business decisiveness and strives to improve

organizational performance; assesses, guides, supports and counsels others to help them refine and acquire new skills; exhibits adaptability to a variety of situations and changing circumstances; generates fresh ideas, perspectives, and original approaches going beyond traditional ways to address issues and problems; independently take action and responsibility for solving problems and making decisions designed to achieve desired outcomes; recognizes and establishes relative importance of multiple issues, tasks, and opportunities to maximize organizational productivity.

**Education:**

Check the one box indicating minimum education requirements for this position for a new employee the first day of work:

- |   |  |
|---|--|
| <input type="checkbox"/> No education required                | <input type="checkbox"/> Related AAS/2-years college/vocational training |
| <input type="checkbox"/> High school diploma or equivalent    | <input checked="" type="checkbox"/> Related Bachelor's Degree            |
| <input type="checkbox"/> 1-year related college/voc. training | <input type="checkbox"/> Related Master's degree                         |

**Please specify the acceptable and related fields of study:**

**Required/Acceptable:** Accounting, Finance, Business, Planning

**Related:** Public Administration, Grant Management, Economics, Mathematics, Finance, Accounting

**Other education, training, certification, or licensing required (specify):** None Specified

**Experience:**

Check the one box indicating minimum work-related experience requirements for this position for a new employee the first day of work:

- |   |   |
|---|---|
| <input type="checkbox"/> No prior experience required | <input checked="" type="checkbox"/> 3 years |
| <input type="checkbox"/> 1 year                       | <input type="checkbox"/> 4 years            |
| <input type="checkbox"/> 2 years                      | <input type="checkbox"/> 5 or more years    |

**Other Specific Experience:** Experience in Federal Grant Management preferred.

**Alternative Qualifications:**

This agency will accept alternative methods of obtaining necessary qualifications.

☒ Yes ☐ No

**Alternative qualifications include:**

A related associate's degree and five years of related experience, or no degree and seven years of related experience.

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**SECTION IV – Other Important Job Information**

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☐ Fingerprint check

☐ Valid driver's license



Background check



Other; Describe

**Other information including working conditions such as shifts, lifting requirements, travel or hours.**

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This position requires occasional travel within the state by auto to monitor contracts on-site and conduct desk reviews of local projects and programs.

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**SECTION V – Signatures**

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Signature indicates this statement is accurate and complete.

***Employee:***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***Immediate Supervisor:***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***Bureau Chief:***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***Division/District Administrator:***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***Department Designee:***

Brent Rabe/Designee Human Resources Division Administrator

Signature: \_\_\_\_\_ Date: \_\_\_\_\_